

**CITY OF LONG BEACH  
MATCHING FUNDS TEMPLATE INSTRUCTIONS  
ELECTION CYCLE: JANUARY 1, 2009 – SEPTEMBER 1, 2010**

- Refer to template titled “APPLICATION PERIOD: 1/01/09 – 2/25/10”:

**Instructions:**

1. List each contribution received, including contributor name, address, occupation, and employer (business name if self-employed).  
***Any contribution that lacks any of the above information will not be included in determining the qualifying amount for matching funds.***
2. Verify that contribution date is within the application period.
3. Check contribution per “person” limitation in determining qualification for matching funds.  
Example: The candidate running for City Council must raise \$5,000 in contributions, of which only up to the first \$100 of contribution(s) per “person” is counted towards the qualifying \$5,000\*\*.
4. Check contribution per “person” limitation in determining qualified amount of matching funds.  
Example: Once the candidate has qualified for matching funds, he/she shall receive \$1.00 for every \$2.00 of contributions raised. In determining the amount of matching funds, only up to the first \$350 of contribution(s) per “person” is counted.

**Note:** *The sample template is assumed to be that used for the candidate’s first application for matching funds. This template would be used to track and review contributions received in one particular application period.*

- Refer to template titled “CONTRIBUTIONS SUMMARY FOR PERIOD: 1/01/09 – 8/31/10”:

**Instructions:**

1. Combine contributions listings from all previous applications submitted for matching funds into one list, including the current application being submitted.
2. Check contribution per “person” limitation in determining qualified amount to-date of matching funds (subject to limit of \$350\*\* per “person”).

**Note:** *The sample template assumes that the candidate has already qualified for matching funds. This template would be used to track contributions from all applications that have been submitted for matching funds, including the latest application being submitted.*

**Suggestion:** Use Excel spreadsheets to track contributions. For ease of checking for limitations on contributions per “person”, sort data by contributor name (in alphabetical order) and then by contribution date. This will help highlight multiple contributions received from one “person”.

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\*\* Amount only pertains to City Council candidates (per example).